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# Operating Procedures

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This chapter outlines the standard procedures which you should incorporate into your regular operational routines. It provides a model for you to follow during the operation of Call Accounting. Use the following schedule as an outline for your own routines.

| <b>Task</b>               | <b>Frequency Performed</b> |
|---------------------------|----------------------------|
| Data Collection           | Daily                      |
| Report Generation         | Monthly                    |
| Directory Maintenance     |                            |
| — Billing Database        | Weekly                     |
| — Customer Directory      | Weekly                     |
| — Telephone Configuration | Monthly                    |
| Data Management           |                            |
| — Backup All Databases    | Weekly                     |
| — Restore All Databases   | When recovering lost data  |
| Database Maintenance      |                            |
| — Archive Call Database   | Monthly                    |
| — Purge Call Database     | Monthly                    |
| — Restore Call Database   | When recovering lost data  |

## Data Collection

The collection of call records (data) from the Meridian 1 or optional Call Detail Recording (CDR) buffer unit to the computer is the most important task of your Call Accounting operations. Without this detailed calling information, Call Accounting cannot produce detail reports.

Run the Data Collection procedure on a daily basis. If there is a problem with the flow of data from the Meridian 1, the system will warn you of the malfunction within a short time period. This early detection can provide for quick corrective action and minimal data loss.

To collect data for this site, click on **Data Collection** from the Communications drop-down menu. It will invoke the Data Supervisor to communicate with the Meridian 1 (or buffer unit) and initiate the data collection.

The status of each data collection procedure is tracked through a file called the Communications Log REPLOG1.LOG and is particularly important with multi-site operations. These logs can provide a history which may be useful in solving a data collection problem.

## Report generation

Reports are the end result of your data collection. However, before you run a report you must identify the filters which will govern the desired reporting results. For example, if you wish the report to correspond to the dates of the telephone company bill, then you must enter these dates in the Select Report Filters dialog. Call Accounting will ignore calls placed on days other than the date range specified.

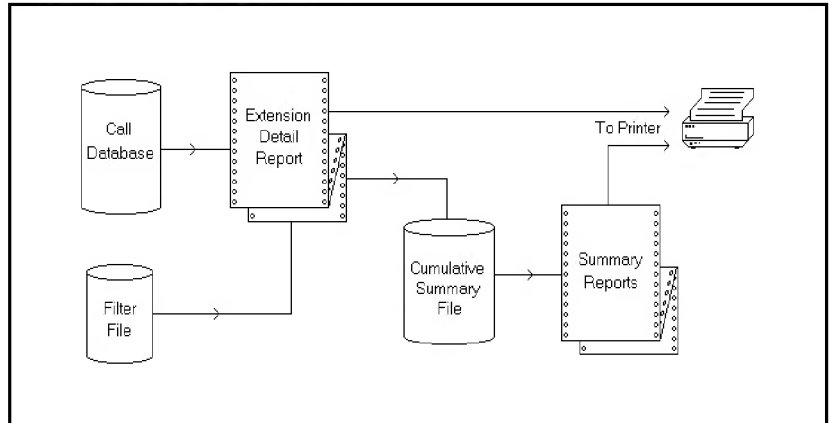
To select your filters, access the Select Report Filters dialog by clicking on **Select Report Filters** from the Reports drop-down menu. Choose your filters and click on the option buttons either to include or exclude the range you selected.

To run a 'month-end' report including the Extension Detail, Department, and Division Summary reports, you would run the Extension Detail Report first and initialize the Summary file. This reduces the run time for the summary reports.

**Note:** If you are not generating the Extension Detail Report, be sure to initialize the Summary file when you run the first report. This will ensure that the system will compile the appropriate summary data prior to printing the report.

The following diagram displays the interaction of the major data files during a report generation.

**Figure 6**  
**Report generation flow**



To run a report, click on **Reports** from the main window. Click on the report type heading and the name of the report from its cascading menu. Next, select the sort criteria (optional) for this report. Once you have entered your criteria, click on the **OK** command button to run the report to the output device specified in the Select Output Device dialog..

## Directory maintenance

This section describes the steps required to update the three main database files. They are the Billing Database, the Customer Directory, and the Telephone Configuration Database. Update these databases on a regular basis in order to keep your reports accurate.

### Billing Database

The Billing Database controls the distribution of costs to the different cost centers within the company or organization. It is extremely important to have each extension's charges allocated to the appropriate department or division. Update this directory on a weekly or monthly basis depending on the size of the directory and the frequency of changes.

To avoid any problems, follow these guidelines during your Billing Database updates.

- 1 From the Reports drop-down menu, select **Directory/Configuration** and then click on **Billing Database Report**. Choose the desired sort order from the Billing Database Report dialog, and choose whether or not authorization codes are to be printed.
- 2 Print the Billing Database Report.
- 3 On the hard copy printout of this report, enter the changes that have occurred over the past month (e.g., new department, staff moving to another department, new extensions, etc.).
- 4 Enter the new changes into the Billing Database.
- 5 Print the Billing Database Report again and verify your changes. Save this hard copy printout to track changes over a long time frame without having to repeatedly access the system.

## Customer Directory

The Customer Directory uses a format similar to the Billing Database. To avoid errors in this directory, print a copy of the directory and check it for errors. Remember to update this directory weekly or monthly depending on its size.

- 1 Click on the **Reports** menu item and select **Directory/Configuration**. From this cascading menu click on **Customer Directory Report**.
- 2 Choose your sort order and print the report.
- 3 Check the validity of the data and make appropriate changes.
- 4 Enter these changes in the database (select **Customer Directory** from the Database drop-down menu).
- 5 Print the new report and save it for future reference.

## Telephone Configuration Database

The Telephone Configuration Database contains the information needed to cost services such as DDD and tie lines. Periodically, you may be required to enter changes to ensure the accuracy of your pricing system. These changes may involve edits to the rate tables, carrier pricing templates, or to the trunk tables.

The following suggested procedure is similar to that outlined in the Billing Database editor.

- 1 From the Reports drop-down menu, select **Directory/Configuration** and then click on **Configuration Diagnostic Report** to print the Telephone Configuration settings. Ensure that the Print Configuration File Contents and the Print Diagnostic Report check boxes are turned on (X). Click on the **OK** command button to print the report.
- 2 Check that the information on this report is complete (including the diagnostics at the end of the report).
- 3 Review the information for accuracy with the appropriate personnel.
- 4 Make the appropriate changes to the Telephone Configuration Database.

## Data management

Call Accounting provides you with tools to back up and restore your main databases. It is important to maintain backup files of these databases on floppy diskettes for security purposes. If your disk drive fails or you erase valuable database files, you can recover this data from your backup diskettes. Storing alternate copies off-site is also beneficial for disaster recovery.

### Backup All Databases

To run the Backup procedure, click on the **Backup All Databases** menu item from the Database drop-down menu. A dialog will appear prompting you to select the destination directory, drive, and path. Select the drive and directory by typing them into the Destination Directories field (or double-click on the items in the Directories list box) and click on the **OK** command button. A dialog will appear listing the database descriptions, source filenames, and backup filenames for the current site.

**Note:** This will only make a backup copy of the Call Accounting database files. If you wish to backup other MAT system files, then use the application to which the database files belong or use the MAT Site Configuration application.

To make a backup copy of a specific file, turn on (X) the Include check box for that site. If you wish to make backup copies of all of the files, click on the **Include All** command button. If you wish to exclude all the files, then click on the **Exclude All** command button. To make backup copies of your files, click on the **OK** command button.

## Restore All Databases

The Restore function allows you to restore any data you may have lost by copying the databases you have previously backed up.

To restore the files you saved using the Backup function, select **Restore All Databases** from the Database drop-down menu. A dialog will appear prompting you to enter the drive and directory from which you wish to restore the files (e.g., A:). Enter this information and click on the **OK** command button.

To restore a specific file, turn on (X) the Include check box for that site. If you wish to restore all of the files, click on the **Include All** command button. If you wish to exclude all the files, then click on the **Exclude All** command button. To restore your files, click on the **OK** command button.

## Database maintenance

The Call Database will remain on the computer's disk drive and continue to grow in size as the system collects call records. You should periodically remove your old data from your databases (usually monthly) using the Archive or Purge functions to save disk space. These functions are executed from the Call Database dialog. To restore any data which you had previously archived, use the Restore command. The following sections will describe how to maintain the Call Database.

### Archive Call Database

Use the Archive function to copy your Call Database from the source disk drive to another disk. This procedure will free up space on your disk drive and enable you to retrieve old data as you require it. In addition, you can optionally purge the data from your working drive. When you archive your data, properly label your diskettes and store them in a safe location.

To archive the database, access the Call Database editor by selecting **Utilities** from the Database drop-down menu and selecting **Call Database** from its cascading menu. Select **Archive** from the Maintenance menu. A filter dialog will appear in which you can enter your minimum and maximum filter range. To include a range, select the option, enter the range, and turn on (X) the Include check box for this filter. Repeat this step for all the filters you wish to include.

## Purge Call Database

Use the Purge function to eliminate any old data which you no longer require. To purge data, access the Call Database editor by selecting **Utilities** from the Database drop-down menu and selecting **Call Database** from its cascading menu. Select **Purge** from the Maintenance menu. A filter dialog will appear containing the specific filters you can define for the call records you wish to delete. In these fields, enter the minimum and maximum range. To include a range, select the option, enter the range, and turn on (X) the Include check box for this filter. Repeat this step for all the filters you wish to include.

## Restore Call Database

To restore data, access the Call Database editor by selecting **Utilities** from the Database drop-down menu and selecting **Call Database** from its cascading menu. Click on the **Maintenance** drop-down menu and click on **Restore**. A dialog will appear prompting you to specify the directory, path, and filename of the data to be restored. Enter this information and click on the **OK** command button to initiate this procedure.